



**2013**

# **Evaluation and Assessment Report (EAR)**

for the

*Durham Comprehensive Plan*



# Purpose

- Rectify differences between City and County FLUMS
- Technical updates to FLUM
- Report on progress of Plan implementation
- Propose changes to Plan policies
- Summary of trends and issues with policy implications



# **Forecasting Development Trends and Issues**

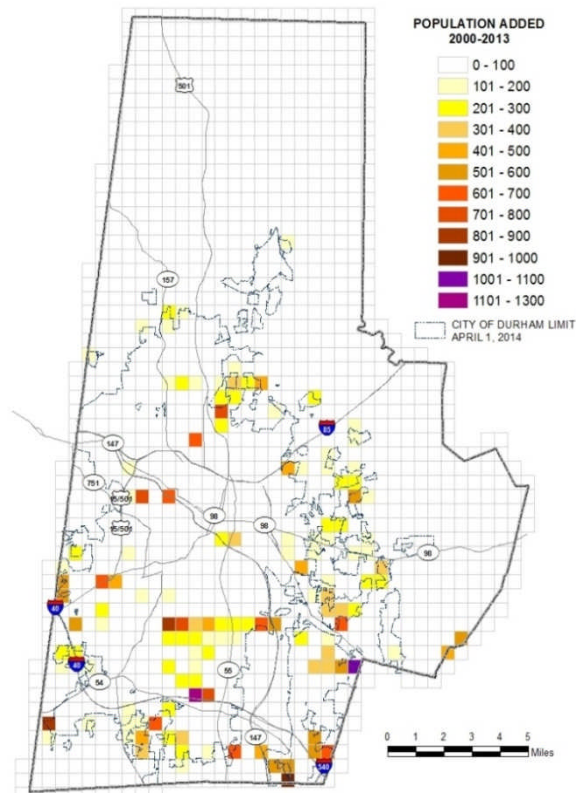
DURHAM



1869  
CITY OF MEDICINE



# Population Growth and Change

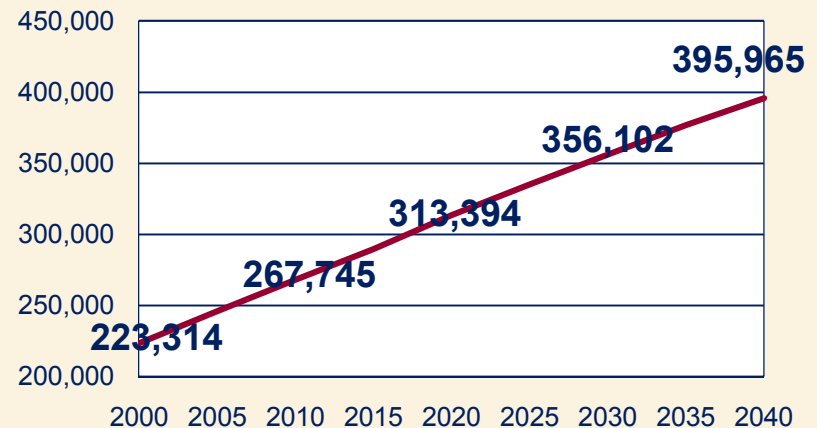


1950: 71,311

2013: 288,133

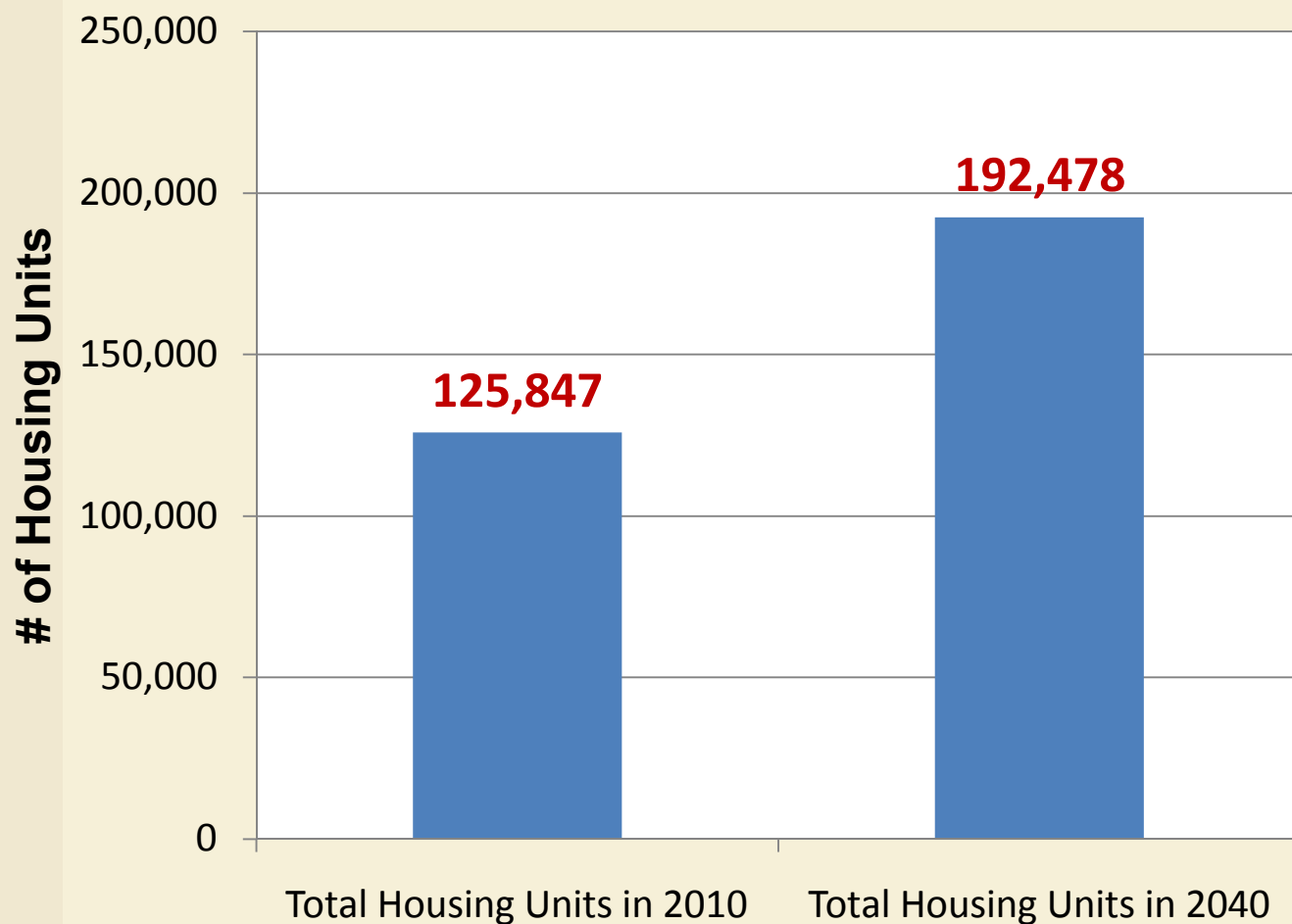
2040: 395,965

## Population, 2000–2040



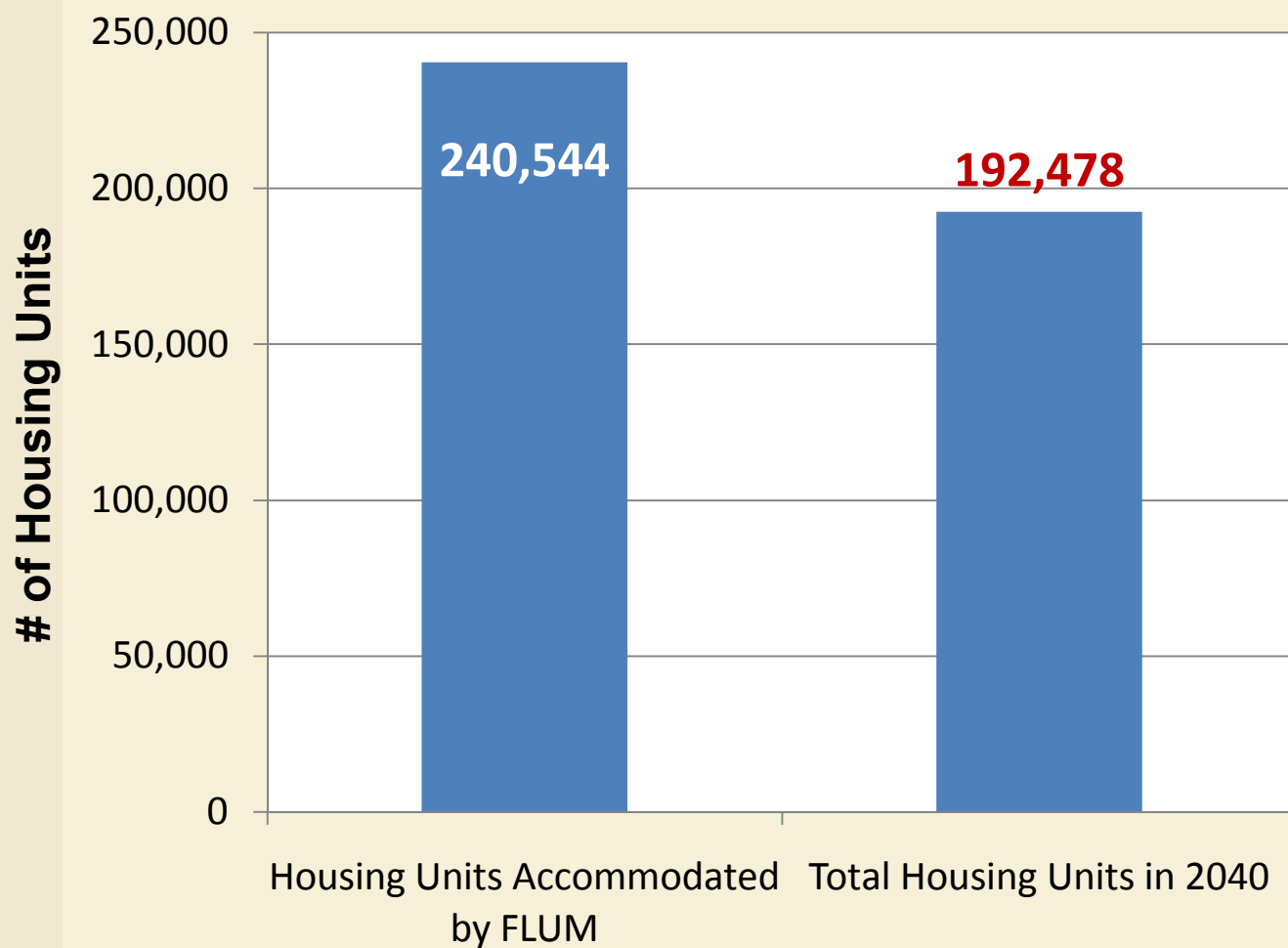


# Residential Land Use Demand





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- ✚ By 2040, ~67,000 housing units will be added, primarily in Compact Neighborhood (CN), Urban, and Suburban tiers.
- ✚ FLUM currently designates ~71,000 acres for residential uses in the CN, Urban, and Suburban tiers.
- ✚ Residential-designated land within CN, Urban, and Suburban tiers can accommodate up to 114,000 additional housing units.



# Planning for an Aging Population

- + Baby-boom seniors are fastest-growing population segment
- + Out-of-state seniors are moving to North Carolina
- + Growing trend toward independent, amenity-rich senior living
  - Co-housing and clustered units
  - Walkable communities with access to services and activities

Does the future land use map support these types of housing?





# Planning for a Diverse Population

- ✚ No clear racial or ethnic majority
- ✚ Minorities demand multigenerational housing and public transit
- ✚ Diverse population demands wide range of housing options (e.g., size, types, price points)

Does the Durham Comprehensive Plan accommodate diverse housing options and public transit?



# Keeping up with the Creative Class

- + Millennials (ages 16–33) represent largest population segment
- + Health care, logistics, technology, and finance industries attract new young professionals
- + Growing “creative class” demands quality of place
  - Access to activities and amenities, arts and leisure
  - Walkable urban hip enclaves with sense of place

Is Durham prepared to retain talented entrepreneurs?

Can economic development efforts avoid displacement of long-term residents?



# Energy

- + Energy use increases in United States by 2% per acre each year
- + Built environment constitute largest category of energy use, and 30–40% of primary energy worldwide is used in buildings
- + Solar, wind, and methane energy:
  - Minimize waste products
  - Maximize monetary savings
  - Reduce environmental costs of harvesting raw materials

How will innovations in energy change the built environment?



# Information and Communication Technology

- ✚ Businesses spend 10% more on ICT each year than in previous years
- ✚ New technologies make communication cheaper, faster, and more reliable
- ✚ Increased data-gathering enables better decision-making in city planning

How will innovations in ICT change the built environment?

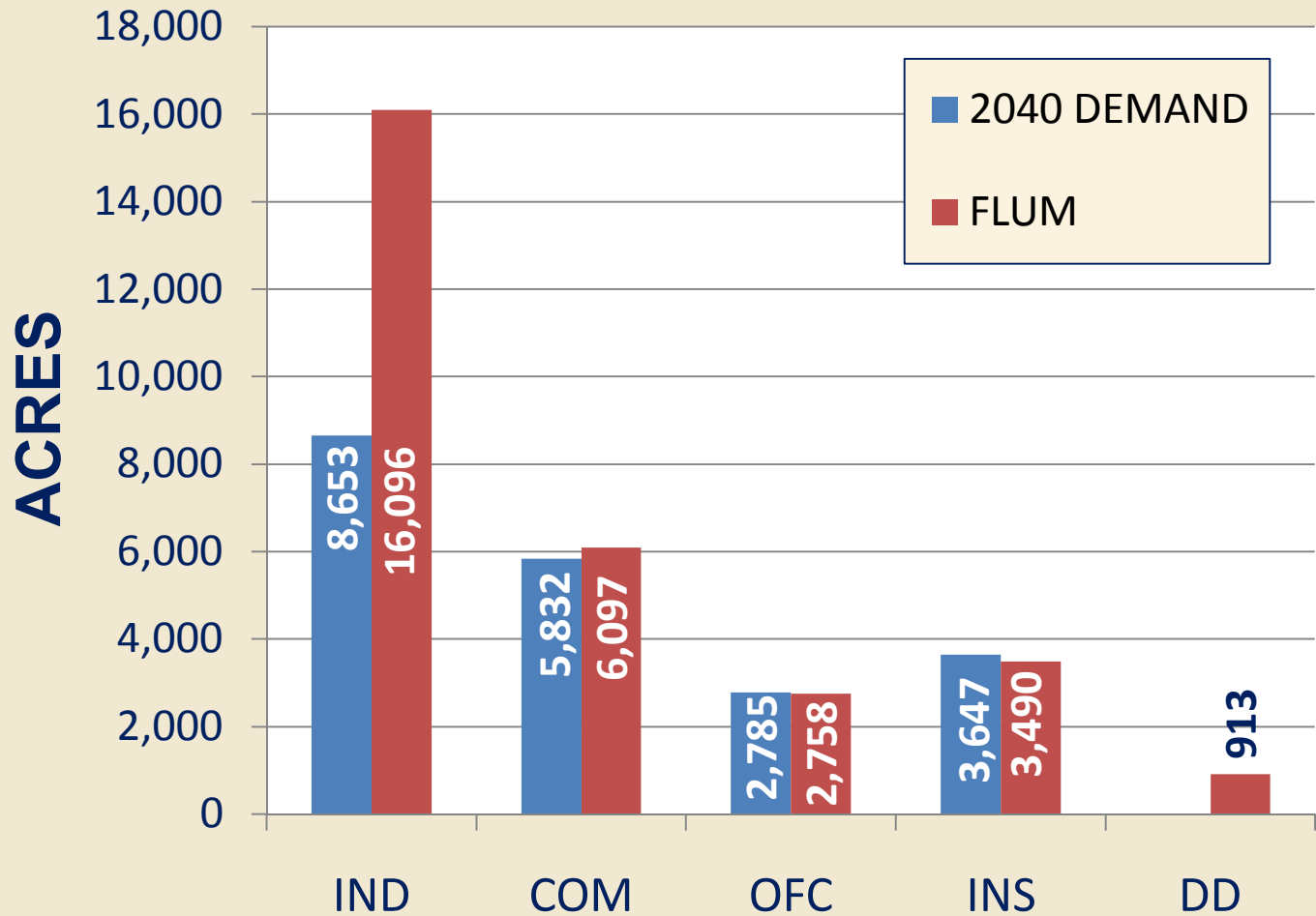


# Real Estate

- ✚ Banks are regaining ease in real estate lending while interest rates are poised to rise
- ✚ Increased demand for small homes on small lots and for multifamily housing
- ✚ Rising rents highlight need for affordability around future transit-oriented sites
- ✚ New generation of post-WWII historic structures sparks new debates around preservation



# Non-Residential Land Use Demand





# Rethinking Commercial Development

How is commercial development changing nationwide?

- Closing of regional malls
- Redevelopment of strip centers
- Increased online shopping

How might the shifting commercial markets impact Durham's planning?



# Rethinking Office Development

How is office development changing nationwide?

- Fewer SF per employee
- “Hoteling” (flexible office space)

What office growth trends are present in Durham?

- Increased vacancy rates for office classes
- Greater demand for urban office environments

How might the shifting office markets impact Durham’s planning?





# Rethinking Residential Development

How are demographic changes (and other trends) impacting housing type demand and location nationally?

- Small houses on small lots
- Multifamily
- Urban-centered

What residential growth trends are present in Durham?

- Continued interest in suburban living
- Increasing demand for downtown living

How might shifting residential patterns impact Durham's planning?



# Rethinking Industrial Development

How do trends in previous section impact industrial land market nationally (e.g., communication technology, employer preferences, “hoteling”)?

Where is industrial development occurring in Durham, and of what type (heavy/light)?

- Trend toward lighter industries
- Limited prime industrial land available

Does the Comprehensive Plan’s Future Land Use Map effectively anticipate these trends?